



# Using the Meeting Tracker

Mentor Guide

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# Managing Meetings

## Viewing All Meetings

Go to the Meetings page. Meetings are listed in a table, with columns for:

- meeting date
- meeting status (whether the mentor and mentee met)
- meeting type
- whether the meeting was with SA-YES staff
- meeting start time
- meeting length
- reason for not meeting
- meeting notes

**View Meetings**

Copy CSV Excel PDF Print

Show 10 entries Search all columns:

Date	Status	Type	With Staff	Start Time	Length (hours)	Reason	Notes
2012-01-24	Yes		No	13:00	2		Notes about the meeting go here
2012-01-17	Yes		No	09:15	1		
2012-01-10	No		No			Communication break down	

Showing 1 to 3 of 3 entries

Delete Edit

More meetings can be displayed by

- Changing the number of entries displayed with the drop down in the upper left

Show 10 entries

- Using the navigation buttons in the lower right



## Sorting Meetings

The entries in the table can be sorted by clicking the table column headers. The column that the table is sorted by will display with a slightly different color. The blue arrow indicates whether the entries are in ascending or descending order.

Date	Status	Reason
2012-01-26	No	Illness
2012-01-18	Yes	

## Searching Meetings

Meetings can be searched across all fields at once (as opposed to filtering each column) by typing search terms into the search box in the upper right.

Search all columns:

## Exporting Meetings

Meetings can be exported to a variety of formats by clicking the buttons in the upper right. Only visible (i.e. rows that are not filtered out) are exported.

Copy CSV Excel PDF Print

## Adding a Meeting

To add a meeting, simply fill in the necessary values in the Add Meeting form. Click in the date field and select a date using the date picker widget.

## Add a Meeting

Meeting Date\*

Did you meet?\* ☐

Meeting Start Time

Meeting Length (hours)

Meeting Type

Was the meeting with SA-YES staff? ☐

Meeting Notes

Select yes or no next to Did you meet? If yes is selected, enter the meeting start time using the time picker widget.

**Add a Meeting**

Meeting Date\*

2012-01-07

Did you meet?\*

☒ Yes ☐ No

Meeting Start Time

11:00

Meeting Length (hours)

Choose Time

Meeting Type

Time 11:00

Was the meeting with SA-YES staff?

Hour

Minute

Now Done

Meeting Notes

Save Meeting

Enter the meeting length, meeting type, and whether the meeting was with SA-YES staff. Click the Save Meeting button.

**Add a Meeting**

Meeting Date\*

2012-01-07

Did you meet?\*

☒ Yes ☐ No

Meeting Start Time

11:00

Meeting Length (hours)

1.5

Meeting Type

In Person ▾

Was the meeting with SA-YES staff?

☐ Yes ☒ No

Meeting Notes

Save Meeting

If no is selected, select a reason. If the reason is **not** Other, all information has been supplied. Click the Save Meeting button.

Meeting Date:

Did you meet? ☐ Yes ☒ No

If you did not meet, what was the reason?

If Other was selected as the reason for not meeting, fill in a reason in the field provided, then click the Save Meeting button.

Meeting Date:

Did you meet? ☐ Yes ☒ No

If you did not meet, what was the reason?

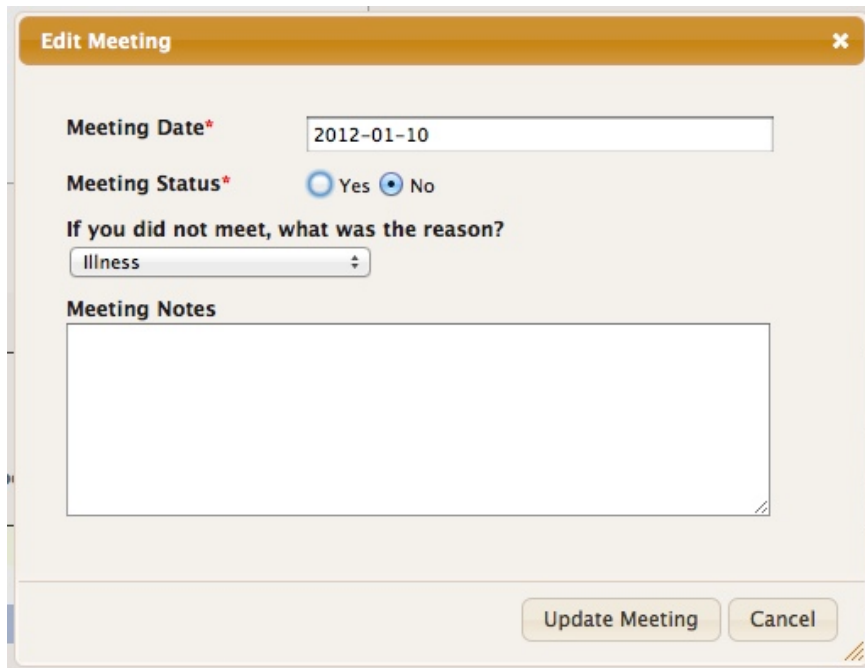
Please specify the reason:

## Editing a Meeting

All information pertaining to a meeting can be modified. To edit a meeting's information, click on the meeting's row in the table to select it, then click on the Edit button at the bottom left of the table.



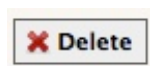
A dialog will appear. To edit a value, simply change the value and click the Update Meeting button. Multiple values can be edited at the same time.



The 'Edit Meeting' dialog box features a title bar with a close button. It contains several input fields: a date field for 'Meeting Date\*' with the value '2012-01-10', a status field for 'Meeting Status\*' with radio buttons for 'Yes' and 'No' (where 'No' is selected), a dropdown menu for 'If you did not meet, what was the reason?' with 'Illness' selected, and a large text area for 'Meeting Notes'. At the bottom right, there are 'Update Meeting' and 'Cancel' buttons.

## Deleting a Meeting

A meeting can be deleted if it was entered in error. **This operation cannot be undone.** To delete a meeting, click on the meeting's row in the table to select it, then click on the Delete button at the bottom left of the table.



# Editing User Information

## Editing User Information and Password

Go to the Edit My Info page. Update any values as necessary and click the Update button.

**Edit User Information**

First Name:	<input type="text" value="Test"/>
Last Name:	<input type="text" value="Mentor"/>
Email:	<input type="text" value="test-mentor@sa-yes.com"/>
Phone Number:	<input type="text"/>
Cell Phone:	<input type="text"/>

**Change Password**

Password:	<input type="password"/>
Re-Enter Password:	<input type="password"/>